

## Front 2 Back Detailed Course Outline

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### Opening

#### **Presentation: Welcome, Logistics & Agreements**

Description: Welcome participants to the course and lay out the basic logistics and agreements.

#### ➤ **Transition / Set up / Instructions**

- Welcome participants to SFA Front 2 Back and introduce facilitators

#### ➤ **Facilitation**

- Welcome participants to the class and ask them to take their seats at tables
- Review course logistics
- Ask participants to list any one of the four service standards -- After all four have been mentioned by participants and discussed, show a summary slide of the four service standards and their definitions

#### ➤ **Key Points**

- Welcome slide (this slide should be on the screen as participants enter the room)
  - Welcome participants, introduce facilitators
- Logistics slide with graphic
  - Explain logistics: location of bathrooms and phones, timing of breaks and lunch
- Four service standards and agreements slide
  - Review four service standards and definitions
  - Introduce other course agreements

#### ➤ **Classroom Materials**

- None

#### ➤ **Participant Guide Materials**

- Review of four service standards, with definitions

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### **Presentation: Where we have been and where we are going & Agenda**

Description: The main points from PBO on the Front Lines and Traditions will be reviewed followed by a presentation explaining the role of Front 2 Back in SFA University's trilogy of courses. The discussion of Front 2 Back's role will logically lead into the agenda.

#### ➤ **Transition / Set up / Instructions**

- Now that we are settled, let's take a look back at what we have learned through past experiences and courses, such as PBO on the Front Lines and Traditions

#### ➤ **Facilitation**

- Present what was taught in the PBO on the Front Lines
- Ask participants to share what was learned in Traditions and capture these points on a flip chart
- Present the agenda describing the different sections of the course

#### ➤ **Key points**

- PBO on the Front Lines review slide(s)
  - What it is to be a PBO etc.
- Traditions slide
  - Traditions: history of programs, service standards, students as customer, listening, change
- Front 2 Back slide
  - Front 2 Back is not a singular event, but one that builds on core elements of our organization
  - Front 2 Back builds on earlier courses and experiences
  - Manage expectations for the scope of the course
- Agenda slide
  - Explain the agenda for the day

#### ➤ **Classroom Materials**

- None

#### ➤ **Participant Guide Materials**

- PBO on the Front Lines Materials
- Traditions refresher questions
- Overview of Balanced Scorecard Topics (Visuals: three legged stool, etc.)
- Agenda for the day

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### PBO Measurements

#### **Activity / Presentation: Alignment Activity**

Description: Participants “align” themselves by characteristics, learning how measurement affects performance.

#### ➤ **Transition / Set up / Instructions**

- Ask participants to line up according to birthday
- Once participants have successfully aligned themselves, ask them to line up again -- The second time the participants will have to line up alphabetically by name and will be timed
- Once participants are lined up by name, ask them to introduce themselves to the other class members present
- Participants sit and facilitator presents some concepts regarding measurement
- Finally, participants will have a discussion about alignment around a mission and measurement at their tables and report back to the class

#### ➤ **Facilitation**

- Present directions to participants and answer any questions that arise before or during the activity
- Give a short presentation regarding measurement concepts
- Ask each table to consider a different issue concerning alignment

#### ➤ **Key points**

- Phase one alignment instructions slide
  - Present basic instructions for the first phase of the alignment activity
- Phase two alignment instructions slide
  - Provide instructions for second phase of alignment game
- Introductions slide with graphic
  - Participants introduce themselves, including where (SFA/ Operating Partner) they work
- Measurement topics slide
  - Let’s look at the measurement tools SFA is using as a PBO
  - The things that get measured are things that get done
  - Measurement places a sense of urgency and accountability on the task - This is true when lining up by name or delivering quality products and services
  - Now we’ve seen the role that measurement plays in alignment
- Measurement and alignment question slide
  - Assign questions to table groups

#### ➤ **Classroom Materials**

- None

#### ➤ **Participant Guide Materials**

- Alignment discussion topics
- Alignment questions for participants to fill in

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### **Activity: Explore the Scorecard**

Description: The participants are introduced to the balanced scorecard and its measurements in a presentation and then apply their learning by completing a measurement worksheet.

#### ➤ **Transition / Set up / Instructions**

- This activity is a logical progression of the discussion of alignment around measurements
- We will now look more closely at some of our measurements and goals

#### ➤ **Facilitation**

- Start with a short presentation about the balanced scorecard and definitions of key terms
- Explain what is being asked of participants on the worksheet
- Answer any questions that participants have during the activity
- Conduct a review of the material and give prizes for correct answers

#### ➤ **Key points**

- Measurement introduction slide
  - PBO measurements
  - Gallup, ACSI, ABC, Balanced Scorecard, Modernization Blueprint
- Key term definition slide
  - Define unit cost, customer satisfaction, employee satisfaction, Etc
- Worksheet instructions slide
  - Detailed worksheet instructions
  - Specific timeframe for completion of sections
- Review questions slide (Questions and answers appear from the side of the screen, keeping them hidden until discussed)
  - Those questions and answers that are most essential for the participants to understand

#### ➤ **Classroom Materials**

- Balanced scorecard
- Performance Plan
- Modernization Blueprint

#### ➤ **Participant Guide Materials**

- Measurement Worksheet
- Definitions of measurement terms

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### **Presentation: Modernization Discussion and Video**

Description: A review of why we're modernizing and some of our Modernization initiatives.

- **Transition / Set up / Instructions**
  - Now that we've reviewed some of SFA's measurements, the next step is to consider how SFA is meeting its goals through Modernization
- **Facilitation**
  - Present Modernization to the group and highlight some significant achievements
  - Lead a discussion about high profile Modernization initiatives in the organization by asking questions for each group to consider and report on
  - Introduce the video presentation
- **Key points**
  - Modernization Presentation Intro Slide
    - Include a general definition of Modernization and a picture of the hairball
  - Modernization Examples Slide (repeat as needed)
    - Includes current and past examples of Modernization success
  - Modernization Discussion Slide
    - Key questions are listed here for the facilitator to disburse amongst the groups
- **Classroom Materials**
  - Video
- **Participant Guide Materials**
  - Video discussion questions

### **Financial Aid Process**

#### **Activity: Draw the Student's Steps**

Description: An activity to demonstrate the different ways people at SFA and Operating Partners view the student's financial aid process.

#### ➤ **Transition / Set up / Instructions**

- Now that we've seen the measurements being used by SFA, we want to take a look at the business that SFA is in -- That business is providing Financial Aid to students
- First, we would like to take a look at the steps a student takes to get financial aid
- At your table, break up into small teams (2-3 people)
- Using the paper and markers provided, draw or write out what you think are the steps the student goes through to get aid

#### ➤ **Facilitation**

- Once the participants are done, collect one or two from each table and post them on a wall, selecting examples that are different from each other
- Discuss these differences as a group

#### ➤ **Slides**

- Draw the Student's Steps
  - In small groups, explain the exercise
- My view of the student's life
  - Although most people are familiar with the business and process, there are differences
  - These differences point to the need for a common framework
  - Need to understand the business "Front 2 Back"
  - No single right answer, but this course presents a common view, a way to get on the same page

#### ➤ **Classroom Materials**

- Flip chart paper
- Markers

#### ➤ **Participant Guide Materials**

- None

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### **Activity: The Student's Life Game**

Description: Participants will play a game that has two objectives: 1) to see the different things the student does during the process to get aid, and 2) to pick up player cards that contain the functions and decisions that the other players in the business perform or make.

#### ➤ **Transition / Set up / Instructions**

- Now that we know that there are many different ideas about what the student experiences, we are going to build a common understanding of that process
- Now please direct your attention to this instructions slide

#### ➤ **Facilitation**

- Allow participants to play the game, answering any questions they might have
- Keep the participants moving through the game
- Present the information in the debrief at the end of the game

#### ➤ **Slides**

- The Student's Life
  - Provide instructions regarding the game (keep this visible while participants "play" the game)
- Three moments of truth slide
  - After participants have played the game, refer back to the need for one common framework
  - This activity allows all of us to see what the student experiences while applying for financial aid, with glimpses at the schools, lenders, and SFA
  - This builds on the three moments we learned in Traditions: Apply, Receive, Repay
  - Within each of these Moments of Truth are other steps to the process
- Apply for Aid: Learn about aid options and apply for aid
  - Expand upon applying for aid with greater detail
- Receive Aid: Evaluate Aid Offer and Accept Aid Offer
  - Expand upon receiving aid with greater detail
  - Discuss the different Aid Programs and characteristics
- Repay Aid: Determine Repayment Options and Repay Loans
  - Expand upon receiving aid with greater detail
  - Discuss exit counseling

#### ➤ **Classroom Materials**

- Game board
- Player function cards
- Dice
- Role cards
- Instruction booklet

#### ➤ **Participant Guide Materials**

- The 3&6 model of the student process

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### **Activity: Who Does What... and When?**

Description: To learn who supports the students, participants will take the player cards they picked up along the way and associate them with a step in the student's process.

#### ➤ **Transition / Set up / Instructions**

- Now that we all have a common understanding of what the student experiences, let's look into what is done behind the scenes to support the students.
- For this, you'll need the player cards that you collected during the game.

#### ➤ **Facilitation**

- Allow participants to sort through the cards, answering any questions they might have
- Keep the participants moving through the activity
- After 10-15 minutes, tell that participants to direct their attention to the screen at the front of the room -- Explain the correct answer as it is depicted on a slide at the front of the room
- Make sure that everyone has placed all of their player cards in the correct order
- Transition into the "and when" activity

#### ➤ **Key Points**

- Who does what?
  - Explain the steps involved in the activity, including the reason for it
- ... and When?
  - Explain the steps involved in this activity
- Who does what and when
  - Build on the previous slides, showing the answers to the exercises
  - This slide gives the correct answer for the activity -- The entire answer should not be displayed all at once though, rather each player card can appear on the screen individually, thus forcing the participants to pay attention to each correct answer
- Supporting the student (illustration of SFA, Lender, and School support)
  - Discuss the larger view of how SFA, lenders, and schools support the financial aid process
  - Demonstrate the processes for each player as seen in the player cards

#### ➤ **Classroom Materials**

- Player cards
- 3&6 model to place cards under

#### ➤ **Participant Guide Materials**

- None



### SFA's Service and Support of the Process

#### **Presentation: Build the SFA Support Model**

Description: Develops a model to illustrate the functions provided by SFA

##### ➤ **Transition / Set up / Instructions**

- Now that we've seen the process of the supporting players in the financial aid process, let's take a closer look at our favorite player: SFA
- What does SFA do?
- SFA wears three supporting hats: process, eligibility & compliance, enterprise-wide functions
- Now we'll build a model that explains how SFA supports the financial aid process through these three major functions / hats

##### ➤ **Facilitation**

- Present a PowerPoint slide show that creates a model of the financial aid process as it's supported by SFA's functions
- Process model maps to the org chart, demonstrating the point with something that is familiar to participants

##### ➤ **Key Points**

- Featuring: SFA
  - Three elements: process, eligibility & compliance, support by enterprise-wide functions
- Build the Model: Supporting the financial aid process
  - From the last exercise, we extract the steps SFA (including its operating partners) has to support the student's financial aid process – such as publishing FAFSAs, processing FAFSAs, producing ISIRs and SARs, etc.
- Eligibility and compliance
  - Then, we look at functions both before and during that process – eligibility (who can play?) and compliance (how well are they playing?)
- Enterprise-wide functions
  - To support the process, eligibility, and compliance, what functions does a PBO organization need: enterprise services
  - How are these functions different as a PBO? (flexibility)
  - This presentation creates a functional model through which we can better understand SFA's roles in supporting the financial aid process
- Morph to Org Chart
  - As an organization, we're familiar with our organization chart – its colors map to this new illustration of our services and functions... green for financial services (as in eligibility, compliance, and receive), yellow for schools (as in eligibility, compliance, and receive), pink for students (as in apply and repay)
  - Present the "morphing" model as it becomes the org chart, the familiar symbol of where people "fit" in the organization – which leads to each participant's consideration of where he/she fits

##### ➤ **Classroom Materials**

- None

##### ➤ **Participant Guide Materials**

- SFA support model picture and description
- Enterprise-wide functional description / roles

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### **Activity: Where do I fit in the process/model?**

Description: At tables, participants map themselves to the functions of SFA

#### ➤ **Transition / Set up / Instructions**

- Now that we've seen how SFA supports the student's financial aid process, let's see where we fit in the picture
- At your tables, take turns explaining where you work within SFA, then "map" yourself to the process by placing a sticky note with your name on the appropriate place on the graphic

#### ➤ **Facilitation**

- Facilitators will walk throughout the room, provide input and additional guidance to tables that need further explanation

#### ➤ **Key points**

- Where do I fit? (completed functional graphic from previous presentation)
  - This exercise enables participants to apply what they learned in the previous presentation
  - Each area, and therefore each person, plays a role in supporting the financial aid process – this exercise lets us visually see where we all "fit" and how we map to the org chart by function

#### ➤ **Classroom Materials**

- Posters of "model" for each table
- Post-it notes

#### ➤ **Participant Guide Materials**

- None

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### **Video: Working at SFA**

Description: Depicts several individuals who work at SFA or its operating partners explaining what they do – includes why they chose public service, why they work at SFA, and other details about their work

#### ➤ **Transition / Set up / Instructions**

- We've now seen several important elements of the financial aid process – the student's perspective, supporting players, SFA's role, and how we each fit in that picture
- Now we'll see some of our colleague's stories – tales from the front lines of SFA and our operating partners about their work
- We'll hear about what we do, why we do it, and how it affects our customers

#### ➤ **Facilitation**

- Present introduction and play video

#### ➤ **Key points**

- Why work at SFA?
- Link the people to the process through personal stories

#### ➤ **Materials**

- TV and VCR
- Video tape presentation

#### ➤ **Participant Guide Materials**

- None

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### **Activity: What about me?**

Description: Table activity where participants complete a worksheet with questions

#### ➤ **Transition / Set up / Instructions**

- Through this course, our focus has narrowed – we've gone from a global view of what students see during the financial aid process to the supporting players, seeing more detail regarding SFA and its operating partners
- Now, we'll take a moment to reflect on ourselves

#### ➤ **Facilitation**

- Introduce table activity where participants complete a worksheet with questions such as:
  - What area are you in?
  - What does that area do?
  - Where do you fit into the picture?
  - How do you (and CAN you) affect the process?
- Participants discuss their answers (and roles) at tables

#### ➤ **Key points**

- What about me?
  - Though we may not have a clear or direct link to the student's perspective of the financial aid process, we all support its success
  - This is an opportunity for each of us to reflect on our part of the big picture – what impact do we (or could we!) have on the process, particularly in light of what we've seen in this course

#### ➤ **Classroom Materials**

- None

#### ➤ **Participant Guide Materials**

- Worksheet with questions for individual participants

### Conclusion

#### **Activity: Tennis ball activity**

Description: A group activity that demonstrates the benefits of clear goals, an established process, and measurements by which we assess our progress

#### ➤ **Transition / Set up / Instructions**

- As we've seen today, the financial aid process is complex
  - There are several players, each with a different perspective and a role to contribute
- This exercise illustrates some of the elements we face in our work
  - Managing a process, measured toward certain goals

#### ➤ **Facilitation**

- Present an explanation of the exercise and relate it to the coursework
- With participants at their tables, the facilitator presents a tennis ball to one participant and presents their task
  - Our mission is to have everyone in the room touch the tennis ball once; you will be timed; your process must involve not letting the ball touch the ground (or we'll have to start over)
  - Once this task is completed, ask participants how they can improve the process, how they can better their measurements
  - After a brief group discussion, participants try again – depending on time, this could be repeated a third time to demonstrate an improved process, a faster time, and greater efficiencies
- When participants have completed the exercise, facilitator leads a group discussion / debrief

#### ➤ **Key points**

- Tennis Ball activity
  - Know the process, the measurement, and the intended result (goals)
  - We have to know the process to change it
  - In our work, as in this exercise, we benefit from keeping our goals in mind, knowing how we're being measured, and working together to increase our success

#### ➤ **Classroom Materials**

- Tennis ball

#### ➤ **Participant Guide Materials**

- None

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### **Presentation: Conclusion**

Description: A facilitator-led presentation that highlights the major learning points of the day, underscoring the key points for participants to remember

#### ➤ **Transition / Set up / Instructions**

- The tennis ball exercise concentrates on our core lessons from the Front 2 Back course
- It serves as a memorable example of learning a process and measuring our progress toward established goals

#### ➤ **Facilitation**

- Present key learning points for the day, providing a basic outline for the critical things participants should remember from the course

#### ➤ **Key points**

- Review
  - The tennis ball exercise concentrates on our core lessons from the Front 2 Back course
    - Knowing the process helps us improve the process
    - Clear goals help us support the process
    - Measurements assess our performance
    - We all have a supporting role in the financial aid process, and it's because of our work that many students can attend school
  - Now you see how things have come together
    - Knowing how we're measured, how we're evaluated, helps us focus our work
    - Understanding the financial aid process from the student's perspective, and seeing how other players support the process, better enables us to aid our customers
    - A sense of our own organization, both in how we support the financial aid process as a whole and how individuals play a part, helps us become more successful
  - Partners, interdependent of each other, working together to achieve goals
  - Understanding the process, and the business behind it, helps us to improve the process

#### ➤ **Classroom Materials**

- Evaluation forms

#### ➤ **Participant Guide Materials**

- Summary sheet with key points of the day

-> **Distribute evaluations for participant Feedback / Evaluation**